

Filtering Data in Web Intelligence Reports

Three levels of filtering data with WEBI

Query Filters:

- Query filters are applied when the WEBI report is created by defining them the data source for the WEBI report. These filters are used to ensure that the data presented in WEBI is uniform and only contains data that is relevant to the topic of the report.
- Query filters are not visible to the business user nor can they be modified by them. The report definition including any filters that have been applied in the query will be disclosed in the report description document.
- Query filters are applied to the report before data is fetched from its data source

Prompts:

- Prompts are defined when the WEBI report is created and are part of the data source definition.
- Prompts can be defined as either mandatory or optional and are used to enforce the security policy and to limit the initial data that is retrieved and stored within the webi report data structure.
- Prompts are applied before data is fetched from its data source
- Business users can use available prompts to reduce the amount of data that is stored within the webi report data structure.

Report Filters:

- Report filters can be defined during report creation or by the business user as needed.
- Report filters are applied after the data is fetched from the data source and effectively hide data.
- Filters hide data that is visible in reports, charts, tables and graphs but the data is still available within the webi report structure. Once a report filter is removed no additional data refreshes are needed.

Report Filters

Filter Bar in Reading Mode

The filter bar allows for the addition of multiple single value report filters on a report

1. Click on **Filter Bar**. This adds another sub menu at the bottom of the basic menu bar
2. Click on the key icon on the new filter bar to add a filter.

The screenshot shows the Business Objects Web Intelligence interface. The top navigation bar includes 'Engage', 'Explore', and 'Explain'. Below this is a document bar with 'Home' and 'Documents' tabs, and a document title 'B0165-1: Job Attribut...'. A toolbar contains icons for 'Web Intelligence', 'Filter Bar', 'Freeze', and 'Outline'. A tooltip for the 'Filter Bar' icon states: 'Click icon to add simple report filters' (labeled with a red '2') and 'Filter Bar' (labeled with a red '1'). The main content area displays the report title 'B0165-1: Job Attributes w/o OrgUnit' and a table with job attributes.

Job	Job Desc	Job Pay Type	Job Pay Area	Job Pay Group	Cal Mth/Yr	Number of Positions	Job Pr
30000314	Accounting Clerk II	Graded	Annual Salaries	GR54	12/2014	10	
30000315	Accounting Clerk III	Graded	Annual Salaries	GR57	12/2014	12	
30000318	Accounting Clerk IV	Graded	Annual Salaries	GR59	12/2014	95	
30000319	Accounting Clerk V	Graded	Annual Salaries	GR61	12/2014	81	
30000325	Accounting Clerk Supervisor V	Graded	Annual Salaries	GR61	12/2014	1	
30000459	Accountant	Flat Rate	Flat Rate	FLATRATE	2014	1	

- Click on **Other** to see the list of available data elements.

The screenshot shows the Business Objects Web Intelligence interface. The 'Others' menu is open, displaying a list of available data elements. A red arrow labeled '3' points to the 'Others' button in the left-hand pane. Another red arrow labeled '4' points to the 'Job' option at the top of the 'Others' list. The main area displays a table titled 'B0165-1: Job Attributes w/o OrgUnit'.

Job	Job Desc	Job Pay Type	Job Pay Area	Job Pay Group	Cal Mth/Yr	Number of Positions	Job Pay
30000314	Accounting Clerk II	Graded	Annual Salaries	GR54	12/2014	10	
30000315	Accounting Clerk III	Graded	Annual Salaries	GR57	12/2014	12	
30000318	Accounting Clerk IV	Graded	Annual Salaries	GR59	12/2014	95	
30000319	Accounting Clerk V	Graded	Annual Salaries	GR61	12/2014	81	
30000325	Accounting Clerk Supervisor V	Graded	Annual Salaries	GR61	12/2014	1	

- Click on the **data element** you'd like to filter on (we are using **Job** in this example)
- The **Job data element** is now added to the filter bar as an item that can be used for filtering. Additional data elements can be added by repeating the same sequence.

The screenshot shows the Business Objects Web Intelligence interface after the 'Job' data element has been added to the filter bar. The filter bar at the top now contains 'Job (All values)' and 'Job Family (No value)'. A red arrow labeled '5' points to these filter bar items. The main area displays a table titled 'B0165-1: Job Attributes w/o OrgUnit'.

Job	Job Desc	Job Pay Type	Job Pay Area	Job Pay Group	Cal Mth/Yr	Number of Positions	Job Pay
30000314	Accounting Clerk II	Graded	Annual Salaries	GR54	12/2014	10	
30000315	Accounting Clerk III	Graded	Annual Salaries	GR57	12/2014	12	
30000318	Accounting Clerk IV	Graded	Annual Salaries	GR59	12/2014	95	
30000319	Accounting Clerk V	Graded	Annual Salaries	GR61	12/2014	81	
30000325	Accounting Clerk Supervisor V	Graded	Annual Salaries	GR61	12/2014	1	

6. Use the drop down box and select the data values you would like to filter on to apply the filter.

Business Objects Engage Explore Explain

Home Documents **B0165-1: Job Attribut...**

Web Intelligence Filter Bar Freeze Outline

Job (All values) Job Family (No value)

Job (All values)
 ABC Chief Administrator
 ABC Permit Compliance Officer
 Access and Visitation Coordinator
 Accountant
Accountant
 Accountant
 Accounting Clerk II
 Accounting Clerk III
 Accounting Clerk IV
 Accounting Clerk Supervisor V
 Accounting Clerk V
 Accounting Director
 Accounting Manager
 AOC Division Assistant
 (Remove)

Drill filter on Job

B0165-1: Job Attributes w/o OrgUnit

Job	Job Desc	Job Pay Type	Job Pay Area	Job Pay Group	Cal Mth/Yr	Number of Positions	Job Min Pay Level	Job Max Pay Level
30000314	Accounting Clerk II	Graded	Annual Salaries	GR54	12/2014	10		
30000315	Accounting Clerk III	Graded	Annual Salaries	GR57	12/2014	12		
30000318	Accounting Clerk IV	Graded	Annual Salaries	GR59	12/2014	95		
30000319	Accounting Clerk V	Graded	Annual Salaries	GR61	12/2014	81		
30000325	Accounting Clerk Supervisor V	Graded	Annual Salaries	GR61	12/2014	1		
30005459	Accountant	Flat Rate	Flat Rate	FLATRATE	12/2014	1		
30009718	ABC Chief Administrator	T-Grade	Annual Salaries	TG80	12/2014	1		
30012947	Accountant	Graded	Judicial	JB18	12/2014	1		
30013040	AOC Division Assistant	Graded	Judicial	JB15	12/2014	1		
30013274	Access and Visitation Coordinator	Flat Rate	Judicial	30013274	12/2014	5		

7. Once the filter has been applied the rows of data not contained in the filter are hidden from view

Business Objects Engage Explore Explain

Home Documents **B0165-1: Job Attribut...**

Web Intelligence Filter Bar Freeze Outline

Accountant Job Family (No value)

B0165-1: Job Attributes w/o OrgUnit

Job	Job Desc	Job Pay Type	Job Pay Area	Job Pay Group	Cal Mth/Yr	Number of Positions	Job Min Pay Level	Job Max Pay Level
30005459	Accountant	Flat Rate	Flat Rate	FLATRATE	12/2014	1	20,000	30,000
30012947	Accountant	Graded	Judicial	JB18	12/2014	1	41,055	45,000
31000025	Accountant	Banded	Career Banding	31000025	12/2014	318	37,012	45,000

8. Filters can only be applied to data that is contained within the webi report structure. Ensure that the data element is displayed in the report layout before adding it to the filter bar, otherwise the filter will be empty and no values can be selected. A filter can be removed from the bar by clicking on the drop down and clicking remove.

7. Report is filtered for Accountants jobs

8. Click on Remove

*There are no values to filter on because this data element is not present in the webi report structure

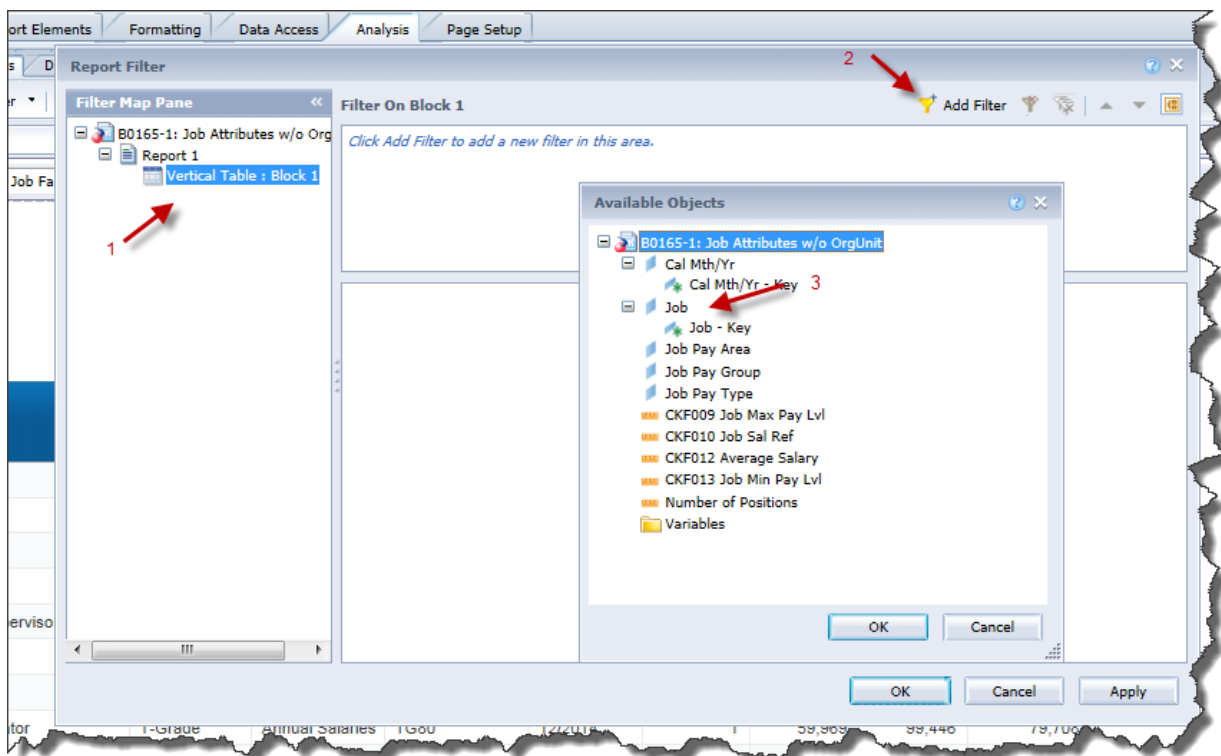
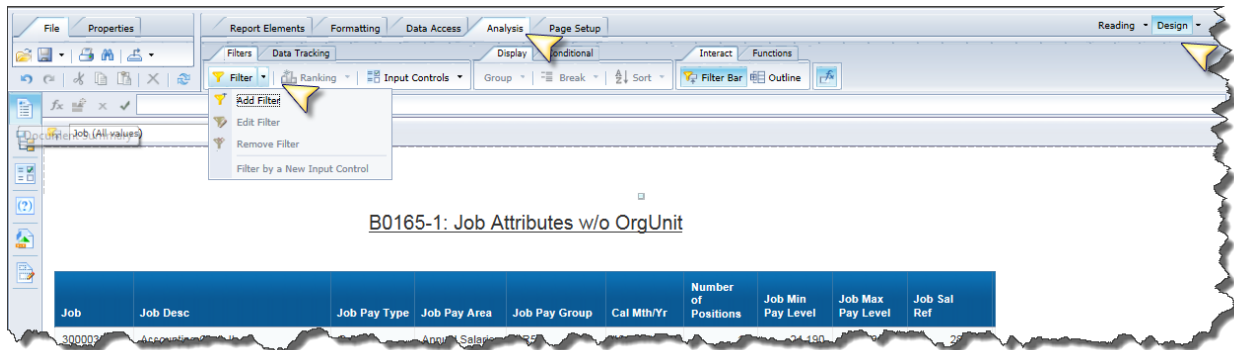
B0165-1: Job Attributes w/o OrgUn

Job	Job Desc	Job Pay Type	Job Pay Area	Job Pay Group	Cal Mth/Yr	Number of Positions	Job Pay I
30005459	Accountant	Flat Rate	Flat Rate	FLATRATE	12/2014	1	
30012947	Accountant	Graded	Judicial	JB18	12/2014	1	
31000025	Accountant	Banded	Career Banding	31000025	12/2014	318	

Filters in Design Mode

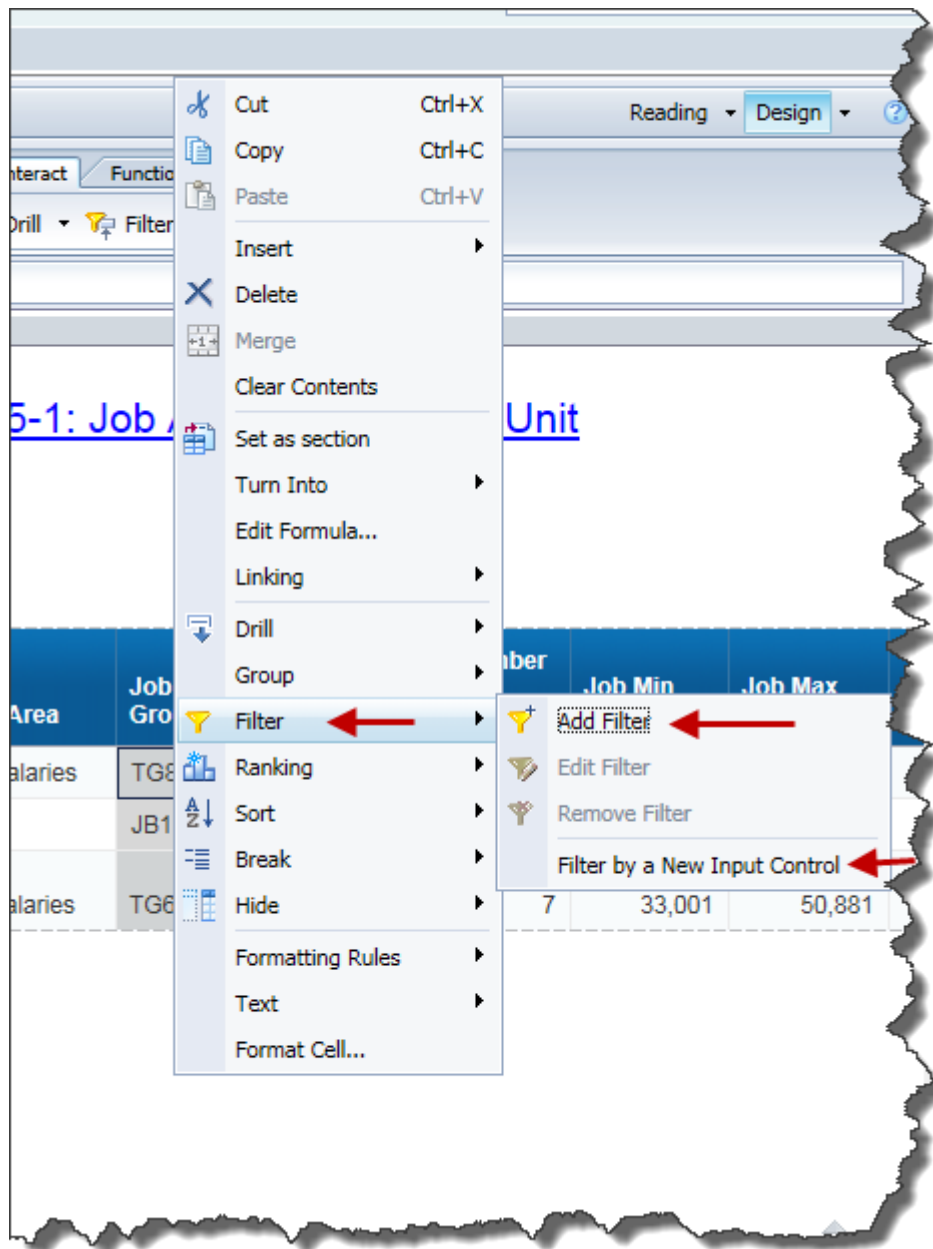
Filter from menu in design mode

Filters in design mode are more flexible and powerful.



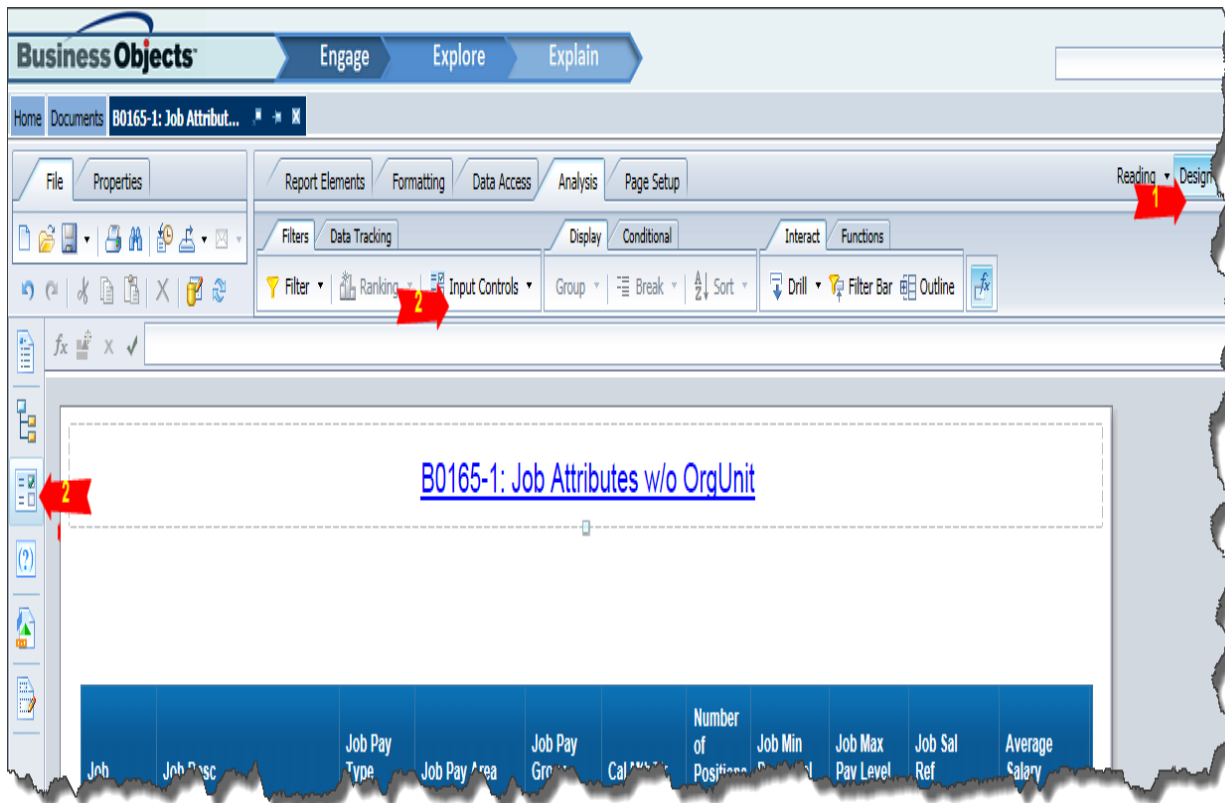
Filter from Context menu

Filter on a selected column can be created from the context menu as you see in the picture below.



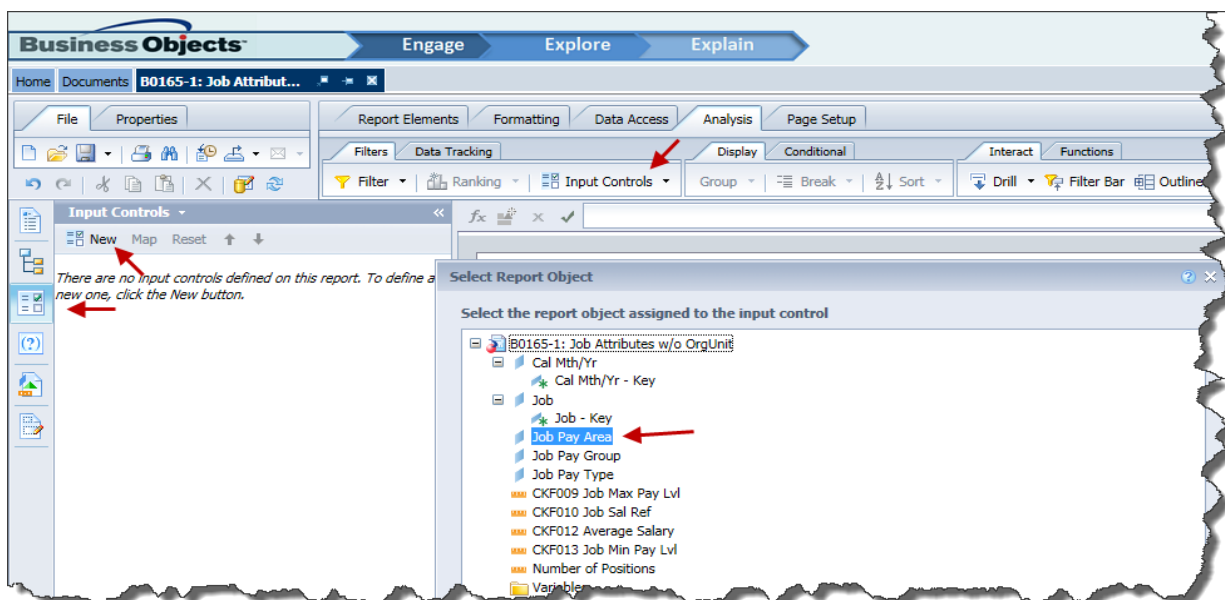
Input Controls

- Input controls provide a convenient, easily-accessible method for filtering and analyzing report data.
- When you select values in the input control, you filter the values in the associated report elements by the values you selected.
- You can use input controls to analyze different scenarios by changing the value of variables.
- Input controls are report-specific.
- They are grouped on the Input Controls tab on the Side Panel.
- You can use input controls on hierarchical data. E.g., Org Unit.



You can add an input control In the Analysis tab, select the Filters sub-tab, and then from the Input Controls dropdown list, select Define Control. Alternatively, choose New from Input Controls side panel.

Select a characteristic dimension or a measure on which the filtering will be done and choose Next. Only the report elements selected in the report will be available for the selection.



In the next screen, Control Types available for selection are:

- Simple Selection – Entry Field, Combo Box, Radio Button and List Box
- Multiple Selection Controls – Check Box, List Box

Choose Control Type
Select a control and its associated properties

Simple Selection

- Entry field
- Combo box
- Radio buttons
- List box
- Calendar
- Spinner
- Simple slider
- Tree list

Multiple Selections

- Check box
- List box
- Double slider
- Tree list

Input Control Properties

List box: Use a multiple list box to select several values from a list of possible values. All alternatives are always displayed and the chosen values are selected.

Control type: List box

Name: Job Pay Area

Description:

List of values: From report

Use restricted List of Values: ☐ Yes

Allow selection of all values: ☒ Yes

Default value(s):

Filter operators: In List

Number of line(s): 5

< Previous Next > Cancel

When a key figure measure is selected for selection control, the control types available for selection are:

- Simple Selection – Spinner, Single slider
- Multiple Selection Controls – Double slider

Input controls can be associated with the report elements such as page or section headers, body or footers.

Assign Report Elements
Select report elements to assign them to the input control

Report object: Job Pay Area Control: List box

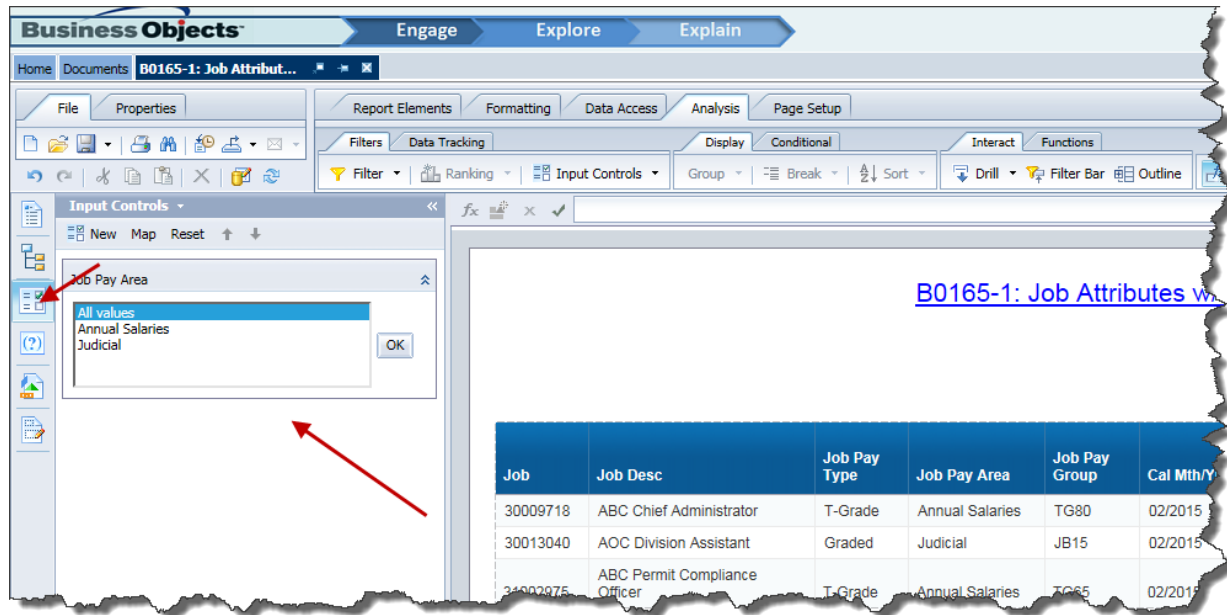
Report structure:

- B0165-1: Job Attributes w/o OrgUnit
 - Report 1
 - Page Header
 - Page Body
 - Block 1
 - Page Footer

< Previous Finish Cancel

Click on Finish after leaving the default selection untouched.

Input controls are report-specific. They are grouped on the Input Controls tab on the Side Panel. You can open the side panel Input control to view, in case the side panel is closed or you are in some other panel.



Selection of one or more values in the input control selection and pressing ok will result in applying the filter criteria to the result in the report.

You can also have multiple input controls within a report.